DOCUMENT RESUME

ED 308 568 EA 020 934

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TITLE Sources of Instructional Leadership.
PUB DATE Mar 89
NOTE 22p.; Paper presented at the Annual Meeting of the American Educational Research Association (San Francisco, CA, March 27-31, 1989).
PUB TYPE Speeches/Conference Papers (150) -- Reports - Research/Technical (143) -- Tests/Evaluation Instruments (160)

EDRS PRICE MF01/PC01 Plus Postage.
DESCRIPTORS Administrator Effectiveness; Behavior; Discriminant Analysis; Elementary Secondary Education; *Instructional Effectiveness; *Instructional Leadership; *Leadership; Leadership Qualities; *Principals; *School Effectiveness
IDENTIFIERS *Effective Schools Research

ABSTRACT

This study assessed patterns of instructional leadership sources. The instrument, Sources of Instructional Leadership (SOIL), was based on instructional leadership and effective schools literature. It dealt with the management of instructional resources, and related to one of six leadership functions: organizing, coordinating, developing, supporting, and monitoring instructional resources; and fostering an academic climate. The respondents, professional educators, included 307 out of 436 possible test trial subjects from seven test trial schools. Their responses were combined with 129 out of a possible 151 responses from three pilot schools and analyzed for response pattern using discriminant analysis. The SOIL questionnaire consisted of 31 instructional leadership items for each of five roles (principal, vice principal, department head, specialist, and teacher). SOIL proved to be a valid and reliable instrument and indicated that patterns of instructional leadership were complex and diverse, but perceptible to the individuals in each school. The results suggest that schools have instructional leadership teams that are identifiable and alterable and that instructional leadership systems can be identified by describing the interrelationships among roles and functions rather than focusing on the leadership of individuals. (JAM)

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SOURCES OF INSTRUCTIONAL LEADERSHIP[1,2]

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SOURCES OF INSTRUCTIONAL LEADERSHIP[1,2]

Philip D. Selim

Introduction

Strong instructional leadership by the principal has long been considered an essential part of school improvement efforts. Several studies of school effectiveness support a strong instructional leadership role by the elementary principal as critical for improving school achievement. Other studies of school effectiveness suggests the principal in collaboration with others provides the instructional leadership required for school improvement. Research on secondary schools suggests they are more loosely coupled than elementary schools and less subject to strong instructional leadership by the principal, but may have pockets of instructional leadership. The leadership literature suggests that effective leadership is context sensitive; therefore, instructional leadership patterns may be different in different contexts and still be associated with improved student achievement. An instrument for describing the patterns of instructional leadership sources suggested in the literature was needed for investigating the relationship between sources of leadership patterns and instructional effectiveness, but no instrument for describing these patterns was available. In addition to developing an instrument for describing patterns of instructional leadership sources in schools, this study suggested that schools have instructional leadership teams with uniquely interrelated roles that address common instructional functions.

Background

Early studies of effective schools identified strong instructional leadership, an academic climate, high expectations for student success, an emphasis on basic skills achievement, and frequent pupil monitoring as a common themes in effective schools (Weber, 1971; Edmonds, 1979; Austin, 1978; Brookover et al., 1978). These studies suggested that a critical element in school improvement was strong instructional leadership usually by the principal. The principal

[1]The author wishes to acknowledge the contributions of Norman A. Newberg, Allan A. Glatthorn, and Edwin B. Hutchins to the research on which this paper is based.

[2]Paper presented at the annual meeting of the American Education Research Association, San Francisco, CA, March 27-31, 1989.

EA 020 934

became the driving force for directing and motivating the school improvement effort. The pattern of school leadership sources suggested by this research could be described as authoritarian, in the sense of having an expert or an authority, where one primary leader is associated with other contributors. This will be referred to as the Authoritarian Model of instructional leadership sources.

Other studies and literature reviews of effective schools identified the common themes of leadership, academic emphasis, high expectations for student success, and frequent monitoring as characteristic of schools with improved student achievement (Wellisch et al., 1978; Venezky & Winfield, 1979; Rutter et al., 1979; Lipham, 1981; Wynne, 1981). However, these studies depicted effective schools as having leaders who collaborated with or involved others in developing the effectiveness ethos or coherence. The pattern of leadership sources suggested in these studies could be described as collaborative where a couple primary sources of leadership are associated with other contributors. This will be referred to as the Collaborative Model of instructional leadership sources.

A third pattern of leadership sources was suggested by the literature on loose coupling. In these studies schools were thought to consist of building block like units which were tenuously grafted to one another (Weick, 1982). In such schools instructional leadership was diffuse, goals were ambiguous, and control mechanisms were weak (Meyer & Rowan, 1978; Deal & Celotti, 1980; Blumberg & Greenfield, 1980). The pattern of leadership sources suggested by these studies could be described as loosely coupled with several minor sources of leadership associated with assorted contributors. This will be referred to as the Loose Coupling Model of instructional leadership sources.

While a more thorough review of the leadership literature's implications for the sources of instructional leadership construct can be found elsewhere (Selim, 1985), this literature does provide support for the three models conceptualized above. The "great man" or trait theories of leadership have generally proved inconclusive, but a study by Schutz (1977) suggested that principal traits may interact with district characteristics to influence perceived effectiveness. These

trait theories seem predicated on the idea that leadership comes primarily from one source, the formal leader who in schools is the principal. Behavioral or leadership style theories explained leadership in terms of task and relationship functions which could be performed by one or more of the members in a group . These leadership style theories suggest that a couple of leadership sources may direct the functions of a group and that there exists the potential for several contributors. Situational leadership theories postulate an association between leadership style and situational variables in which situational factors either cause one style of leadership to be favored over others, or nullify all formal leadership efforts (Kerr & Jermier, 1978). These situational theories suggest many patterns of leadership sources are possible with up to several leadership sources existing in conjunction with perhaps several contributors. The specific pattern of sources and contributors would be determined by the characteristics of a particular situation. Studies of leadership in education show evidence of instructional leadership functions and provide support for the Authoritarian, Collaborative, and Loose Coupling models of leadership sources (Selim, 1985). Thus, the leadership literature and studies of leadership in education suggest that the functions associated with instructional leadership in effective schools may be directed by either the principal alone, the principal in partnership with a few others, or by a variety of individuals at different times.

Construction of SOIL Questionnaire and Pilot Trial

Since an instrument for assessing patterns of instructional leadership sources in schools was not found in the literature, the process of developing one was begun. Following a review of the instructional leadership and effective schools literatures, a draft of the instrument, Sources of Instructional Leadership (SOIL), was written. An analysis of the instrument's item content indicated the questions dealt with the management of instructional resources and were related to one of six school leadership functions (see Table 1).

Table 1

Content Map of SOIL Questions

School Leadership Function	Instructional Resource Category	SOIL Question Number
Organizing Instructional Resources[a]	Personnel	4, 7, 20
	Materials & Policy	6, 8, 26
Coordinating Instructional Resources[a]	Rules	2, 3
	Curricula	25, 27
Developing Instructional Resources[a]	Materials	9, 10
	Methods	12, 21, 29
	Programs	31
Supporting Instructional Resources[a]	Services	11
	Money	16
Monitoring Instructional Resources[a]	Observing	17, 18, 28
	Assessing	5, 14, 30
Fostering an Academic Climate	Communication	1, 12, 19
	Action	15, 23, 24

[a] Resources are time, personnel, money or materials.

These functions parallel the characteristics of effective schools reported in the literature (see Table 2). The instrument was reviewed by selected educational experts and revised before being individually administered to seven test subjects. Based on the experience with the test subjects trials the instrument was again revised (see Appendix A), and directions for administration written.

Table 2

Conceptual Relationship of SOIL Questions to the Characteristics of Effective Schools, Instructional Leadership Behaviors, and Yukl's Intervening Variables

SOIL Question Number	Edmond's Effective School Characteristics	Sweeney's Instructional Leadership Behavior's	Yukl's Intervening Variables
4, 6, 7, 8, 20, 26	Administrative Leadership	Sets Instructional Strategies	Task-Role Organization [a]
2, 3, 25, 27	Emphasis on Basic Skills	Coordinates	Subordinate Role Clarity [b]
9, 10,13, 21, 22, 29, 31	High Expectations for	Emphasizes Instruction	Subordinate Task Skill
11, 16	Student Success	Supports	Resource & Support Services
5, 14, 17, 18, 28, 30	Pupil Monitoring	Evaluates Pupil Progress	Subordinate Effort
1, 12, 15, 19, 23, 24	Academic Climate	Orderly Atmosphere	Group Cohesiveness & Teamwork [c]

[a] Resembles Fiedler's position power. [b] Resembles Fiedler's task structure or initiating structure. [c] Resembles Fiedler's leader-member relations or consideration.

Three schools were selected for a pilot trial (elementary school, middle school, and junior/senior high school) in which scale reliability and instrument administration were evaluated. The schools were selected by the author and an advisor because they were judged to be improving or successful instructionally, and to vary in size, grade level, socio-economic level and achievement (see Table 3).

Table 3

Summary of School Data for Pilot Trial Schools

Characteristic	School Number 1	2	3
Level[a]	H	M	E
Location[b]	S	S	S
Number of Pupils	929	746	297
Number of Teachers	72	53	21
Number of Administrators	3	2.5	1
Mean Pupil Attendance	91%	93%	96%
Mean Teacher Attendance	93%	92%	96%
Mean Administrator Attendance	100%	97%	100%
% Title I Pupils	0%	0%	0%
% Free & Reduced Lunch Pupils	21%	7%	9%
Total Reading Achievement Test Data			
Mean Grade Equivalent Above (Below) Grade Level	.3	3.7	2.6
Total Math Achievement Test Data			
Mean Grade Equivalent Above (Below) Grade Level	.3	3.0	1.4

[a]H=Junior/Senior High School, M=Middle School, E=Elementary School. [b]S=Suburban

The responses of 129 professional educators in the three pilot schools were collected in March, 1982. The SOIL questionnaire, consisted of 31 instructional leadership items for each of five

roles (principal, vice principal, department head, specialist, teacher), and asked respondents to rate the role incumbents as providing leadership, contributing but not leading, or not leading or contributing for each of the 31 items. These responses were analyzed by role scale for internal consistency reliability (Cronbach's alpha). Reliability coefficients of .93, .96, .96, .93, and .89 were found for the principal, vice principal, department head, specialist, and teacher role scales, respectively (see Table 4).

Table 4

Reliability Coefficients for the Five Instructional Leadership Role Scales

Role Scale Name	Reliability Coefficient[a]
Principal	.93
Vice Principal	.96
Department Head	.96
Instructional Specialist	.93
Teacher	.89

[a]Cronbach's Alpha

A Varimax factor analysis of the pilot responses showed that respondents perceived independent leadership contributions for each role. Based on these results in the pilot study, further testing of SOIL was initiated.

Instrument Test Trial

For the test trial seven additional schools were selected by the author in consultation with an advisor. The selected schools were reputedly improving or successful and intentionally varied in size, level, location, attendance, socio-economic level, and achievement (see Table 5).

Table 5

Summary of School Data for Instrument Test Trial Schools

Characteristic	School Number 4	5	6	7	8	9	10
Level[a]	J	J	J	J	E	E	E
Location[b]	U	U	U	U	S	U	U
Number of Pupils	1216	1435	1340	1300	394	626	1105
Number of Teachers	73	88	82	81	18	31	47
Number of Administrators	3	3	3	3	1	1	2
Mean Pupil Attendance	75%	75%	70%	84%	95%	95%	92%
Mean Teacher Attendance	85%	86%	90%	95%	95%	93%	97%
Mean Administrator Attendance	98%	90%	99%	98%	100%	100%	100%
% Title I Pupils	34%	63%	57%	43%	0%	0%	55%
% Free & Reduced Lunch Pupils	16%	35%	52%	19%	20%	46%	64%
Total Reading Achievement Test Data							
% at or above 50% ile	31%	13%	14%	29%		69%	49%
Mean Grade Equivalent Above (Below) Grade Level					.6		
Total Math Achievement Test Data							
% at or above 50% ile	20%	13%	12%	18%		74%	47%
Mean Grade Equivalent Above (Below) Grade Level					.3		

[a]J=Junior High School, E=Elementary School. [b]S=Suburban, U=Urban.

The SOIL questionnaire was administered to the professional staff in each test trial school between April 20 and May 11, 1982. Of the 436 possible test trial subjects, 307 subjects returned useable questionnaires (3% were unusable; 27% were absent or failed to return a questionnaire). These were combined with the responses from 129 pilot trial subjects (out of a possible 151) and analyzed for response patterns using discriminant analysis. If general patterns of instructional leadership sources existed and were perceived, when the discriminant analysis classified subjects into groups based on their responses, there would be three groups similar to the hypothesized models. If school specific patterns of instructional leadership sources existed and were perceived, subjects would be classified into groups by school and simultaneously distinguished from every other school group. If subjects were not classified into distinct groups by the discriminant analysis, then patterns of instructional leadership sources would be considered non-existent or not perceptible.

Results of the Test Trial

The initial discriminant analysis resulted in the identification of nine significant discriminant functions and a correct classification percentage of 94.04%. This indicated that school specific response patterns could be identified and used to correctly classify subjects into the schools in which they worked 94% of the time (see Table 6). Since this level of correct classification was unexpectedly high, the results were considered dubious particularly because the elementary and secondary schools used in the analysis had different role structures. Generally, elementary schools did not have vice principals or department heads and secondary schools did. Therefore, an elementary and a secondary reanalysis were done using discriminant analysis. The middle school was dropped from these reanalyses, since its role structure was unlike that of any other school in the study. The the classification matrices resulting from these reanalyses are shown in Tables 7 and 8.

Table 6

Discriminant Analysis 1: All Schools Classification Matrix

Actual School Membership	Number of Cases	Predicted School Membership									
		1	2	3	4	5	6	7	8	9	10
1	62	60 95.2%	0 0%	0 0%	3 4.8%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%
2	48	1 2.1%	45 93.8%	0 0%	0 0%	1 2.1%	1 2.1%	0 0%	0 0%	0 0%	0 0%
3	18	0 0%	0 0%	18 100%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%
4	46	0 0%	0 0%	0 0%	38 82.6%	2 4.3%	2 4.3%	4 8.7%	0 0%	0 0%	0 0%
5	65	0 0%	0 0%	0 0%	0 0%	62 95.5%	1 1.5%	2 3.1%	0 0%	0 0%	0 0%
6	52	0 0%	0 0%	0 0%	1 1.9%	0 0%	50 96.2%	0 0%	1 1.9%	0 0%	0 0%
7	71	0 0%	0 0%	0 0%	1 1.4%	2 2.8%	2 2.8%	66 93.0%	0 0%	0 0%	0 0%
8	18	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	18 100%	0 0%	0 0%
9	19	0 0%	0 0%	0 0%	0 0%	0 0%	1 5.3%	0 0%	0 0%	18 94.7%	0 0%
10	36	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	1 2.8%	35 97.2%

Note. Overall correct classification was 94.04%

Table 7

Discriminant Analysis 2: Secondary Schools Classification Matrix

Actual School Membership	Number of Cases	Predicted School Membership				
		1	4	5	6	7
1	62	60 95.2%	2 3.2%	0 0%	1 1.6%	0 0%
4	46	0 0%	41 89.1%	1 2.2%	2 4.3%	2 4.3%
5	65	0 0%	1 1.5%	62 95.4%	1 1.5%	1 1.5%
6	52	0 0%	0 0%	0 0%	52 100%	0 0%
7	71	0 0%	2 2.8%	1 1.4%	1 1.4%	67 94.4%

Note. Overall correct classification was 94.95%

Table 8

Discriminant Analysis 3: Elementary Schools Classification Matrix

Actual School Membership	Number of Cases	Predicted School Membership			
		3	8	9	10
3	18	18 100%	0 0%	0 0%	0 0%
8	18	0 0%	18 100%	0 0%	0 0%
9	19	0 0%	0 0%	19 100%	0 0%
10	36	0 0%	0 0%	0 0%	36 100%

Note. Overall correct classification was 100%

The reanalysis of the secondary school data resulted in the identification of four significant discriminant functions and a 94.95% correct classification. The reanalysis of the elementary school data resulted in the identification of three significant discriminant functions and a 100% correct classification. These results confirmed the initial outcome and suggested that each school had its own specific pattern of instructional leadership sources that was widely perceived by the professionals in that school.

In 1984, a study investigating the validity of a slightly modified version of SOIL was conducted in eight high schools in Tucson, Arizona (Anderson, 1984). This study related SOIL responses to responses on two other instruments and to interview data. All three validation procedures supported the validity of the modified SOIL instrument and provided evidence that different roles (sources) performed different leadership functions in different schools. These results are similar to the findings of the ethnographic study of Newberg and Glatthorn (1983) conducted in the four junior high schools included in the study presented in this paper. All three of these studies suggest that SOIL is a dependable instrument for describing patterns of instructional leadership sources, instructional leadership is distributed across several roles in a school, and this distribution is likely to be different in different schools.

Discussion

The results of this study suggested SOIL was a reliable instrument for describing patterns of instructional leadership sources. The existence of perceived patterns of instructional leadership sources indicated that professional staff members recognized the differing contributions of various role incumbents to different leadership functions. These perceived patterns of instructional leadership sources were distinctive for each school and associated with all roles and functions surveyed. The instructional leadership roles and functions appeared interrelated with the principal and vice principal roles being pivotal in determining the pattern of school leadership sources . These outcomes indicated that the schools had instructional leadership teams whose members were interrelated in ways that were commonly recognized by the professional staff in each school.

The Authoritarian, Collaborative, and Loose Coupling models of instructional leadership sources hypothesized earlier were too global for classifying the complex set of interrelationships found among instructional leadership sources in the sample schools. Each school apparently evolved its own system of instructional leadership sources or instructional leadership team. The notion of an instructional leadership team was supported by Hall's (1987) research which found that "Change Facilitating Teams" and "Change Facilitation Functions" were important concepts for understanding the implementation of new programs. Hall also noted that the principal's change facilitating style (Initiator, Manager, Responder) was related to the roles of other change facilitators. These studies reinforce the position advanced by Glatthorn and Newberg (1984) that a team or systems approach to instructional leadership is productive because it focuses on the interrelationship of functions and roles rather than on individuals.

The matrix format of SOIL provides an abundance of data for analyzing a school's instructional leadership team, and furthermore, the matrix design has been successfully used in analyzing other organizational settings (McCann & Gilmore, 1983). In an individual or department analysis, one can compare responses on one item, on one item across roles, or on one role across items to responses of other individuals or to group means. An analysis by role reveals the relative influence of instructional leadership sources overall or by function and the degree of consensus regarding the level of leadership. An analysis by function shows the extent of involvement of different sources, as well as, the degree of consensus regarding the extent of involvement. Another type of analysis can compare the current and desired levels of involvement by each source on one function or the relative emphasis a source allocates to various functions. These analyses can help to identify areas of concurrence and conflict, in addition to options for renegotiating relationships. However, before starting these analyses consider their repercussions, since ambiguity about relationships may be more highly valued than clarity, the information may be misused to assign blame, aggregating large data sets can mask valuable information, and the analyses can be complex and time-consuming. Still, the matrix approach has promise for helping schools describe, analyze and design effective instructional leadership teams.

The results of the research reviewed in this paper suggest that SOIL is a valid and reliable instrument for assessing patterns of instructional leadership sources. Such patterns indicate the presents of school specific instructional leadership systems which may be useful in understanding the complex processes of school improvement or change. The matrix framework utilized in SOIL relating sources and tasks generates an abundance of information for analyzing school leadership systems, but it's complexity can make interpretation and utilization difficult. Nevertheless, SOIL may help schools to describe and build their instructional leadership team.

Summary

Organizational theory, like leadership theory, recognizes the usefulness of a contingency approach for understanding organizations because it relates organizational practices to conditions in the organization and environment (Corwin, 1974). Many models have been suggested for describing the patterns of leadership in organizations (Boyd & Crowson, 1981). The effective schools literature identified the principal (Authoritarian Model) or the principal in collaboration with a few others (Collaborative Model) as two patterns of instructional leadership sources associated with school improvement. The loose coupling research suggested instructional leadership sources were diverse and weakly linked in successful schools (Loose Coupling Model). Investigating these discrepancies involved developing and testing the instrument, Sources of Instructional Leadership (SOIL), which was designed to identify patterns of instructional leadership sources in schools. Tests of SOIL showed it to be reliable and valid, and indicated that patterns of instructional leadership sources were complex and diverse, but perceptible to the individuals in each school. These results suggest that schools have instructional leadership teams which are identifiable and alterable. The matrix format utilized by SOIL generates an abundance of information regarding a school's instructional leadership team, but its interpretation can be difficult and time-consuming. While further evaluation of the SOIL instrument is crucial, its initial success suggests that schools have instructional leadership systems which can be identified by describing the interrelationships among roles and functions rather than focusing on the leadership of

individuals. These results also suggest that school effectiveness may be more closely associated with accomplishing important instructional leadership functions than with a particular pattern of leadership or leadership sources.

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SOURCES OF INSTRUCTIONAL LEADERSHIP

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Please answer the following questions (all answers are confidential):

1. The name of your school: _____
2. Your present role (circle one): Principal Vice Principal
   Department Head Specialist (reading or math) Teacher
   Counselor Other (identify): _____
3. Your sex (circle): Male Female
4. Your age: _____
5. The number of years you have been an educational professional: _____
6. The number of years you have been in your present school: _____
7. The number of years you have been in your present role: _____

Directions: Listed on the left of pages 2 and 3 are the tasks and functions usually associated with instructional leadership. On the right are listed the roles of the individuals who often perform those tasks and functions. For each role listed, indicate to what extent that person in your school performs that task or function, at the present time, by writing one of the letters defined below in the appropriate box.

L--provides leadership in this task or function

C--contributes to this task or function but does not provide leadership

If the person does not currently perform that task or function, leave the box blank. If no one in your school currently performs that task or function, leave all the boxes in that line blank.

The following terms are used to identify instructional or administrative personnel:

Principal--the principal or head of the school

Vice Principal--an assistant administrator

Department Head--the head of a group of teachers in a single subject area or discipline

Specialist--a school-based reading or math specialist

Teacher--a classroom instructor

Consider what the person in each role actually does as you think about each task or function.

Record L provides leadership

C contributes but does not provide leadership

leave box blank if L or C is not appropriate

INSTRUCTIONAL LEADERSHIP TASK OR FUNCTION	PRINCIPAL	VICE PRINCIPAL	DEPARTMENT HEAD	SPECIALIST	TEACHER
1. Articulates the instructional goals of the school.					
2. Helps teachers to relate the school's instructional goals to their curriculum units.					
3. Clarifies the instructional responsibilities of each professional role.					
4. Selects instructional personnel.					
5. Evaluates teachers.					
6. Develops the school's master schedule.					
7. Assigns teachers to specific sections or classes.					
8. Allocates materials needed to accomplish instructional goals.					
9. Helps teachers to evaluate instructional materials.					
10. Helps teachers to develop appropriate instructional materials that are not commercially available.					
11. Sees to it that the necessary support personnel (aides, secretaries, etc.) are made available to assist teachers in accomplishing instructional goals.					

Record [L] provides leadership

[C] contributes but does not provide leadership

[ ] leave box blank if L or C is not appropriate

INSTRUCTIONAL LEADERSHIP TEST OR FUNCTION	PRINCIPAL	ICR. PRINCIPAL	(20) DEPARTMENT HEAD	SPECIALIST	TEACHER
12. Communicates to parents the importance of basic skills instruction in the school.					
13. Organizes staff development programs that relate to instruction.					
14. Analyzes standardized achievement test scores to identify general instructional strengths and weaknesses.					
15. Schedules assemblies that have an instructional emphasis.					
16. Secures additional funds for instructional purposes.					
17. Observes teachers in their classrooms.					
18. Encourages teachers to observe each other's classes.					
19. Communicates to all students the school's general concern for achievement.					
20. Organizes teachers to work together on instructional matters.					
21. Provides help to teachers who want to improve their teaching.					
22. Approves new programs that have an instructional emphasis.					
23. Takes steps to improve student discipline.					
24. Takes steps to develop a school climate conducive to learning.					
25. Coordinates instruction between teachers at different grade levels.					
26. Establishes a school policy on student promotion.					
27. Helps individual departments to coordinate their curricula.					
28. Gives teachers non-evaluative feedback about their teaching.					
29. Suggests alternative instructional methods for children who are failing consistently.					
30. Gives teachers feedback on their weekly lesson plans.					
31. Works with teachers to improve the instructional program of the school.					